**Blackbaud Education Management**

Financial Aid Management Workbook

One of the key components to a successful implementation is communication. This workbook is one of the most important tools your Blackbaud consultant uses to understand your school’s unique setup and needs, and how you plan to use the software. Knowing that schools often change their setup and process to better serve their community, please note that these will be used to configure your software. While you are not locked into the answers you give here, should the school choose to change these options after the consultant has configured the system based on your answers here, the school may incur additional costs and delays. Please make sure that you continually are communicating with your consultant about changes that are coming or are being discussed to avoid potential issues.

|  |  |
| --- | --- |
| **School Name:** |  |
| **Completed By:** |  |
| **Job Title:** |  |
| **Blackbaud Consultant:** |  |

# SYSTEM CONFIGURATION

**Grade Levels**

Please provide all school grade levels along with tuition rate and if that grade level is eligible for aid. **Note**: If you are using Blackbaud Enrollment Management System or Tuition Management System, please list your grades as they appear in your system setup**.**

|  |  |  |
| --- | --- | --- |
| **Grade Level** | **Tuition Rate** | **Eligible for Aid** |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |
|  |  | [ ]  Yes [ ]  No |

**Standard Discounts**

Please read the following information on [Standard Discounts.](https://kb.blackbaud.com/knowledgebase/articles/Article/203390)

|  |  |  |
| --- | --- | --- |
| **Standard Discount** | **Calculation** | **Value** |
| 2nd Child Discount | [ ]  Amount [ ]  Percentage |  |
| 3rd Child Discount | [ ]  Amount [ ]  Percentage |  |
| 4th Child Discount | [ ]  Amount [ ]  Percentage |  |

**School Users**

Please provide a list of users that should have access to Blackbaud Financial Aid Management. For each user, please list their full name, email address, and what level of access they should have. Please refer to [this link](https://kb.blackbaud.com/knowledgebase/articles/Article/205082) for list of roles and descriptions.

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| --- | --- | --- |
| **Full Name** | **BBID Email Address** | **Access Level** |
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**Important Dates**

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| **Dates/Deadlines** |
| When would you like your application to be available to families? |  |
| What is your deadline for families applying for aid? |  |
| Is your deadline [loose or strict?](https://webfiles-sc1.blackbaud.com/files/support/helpfiles/financial-aid/content/sa-deadlines.html) |  |
| When does your school make decisions regarding awarded amounts? |  |
| When does your school plan to release awarded amounts to families? |  |

**Additional Settings**

|  |  |
| --- | --- |
| Do you plan to send award letters through the Financial Aid Management System? | [ ]  Yes [ ]  No |
| If sending award letters through BBFA, will you allow parents to appeal their awarded amount? | [ ]  Yes [ ]  No |
| Do you display Financial Aid on your Enrollment Contracts? | [ ]  Yes [ ]  No |
| Integration Options | [ ]  Tuition Management [ ]  Enrollment Management [ ]  None |

**Codes**

Please read the following information on [Financial Aid Codes.](https://kb.blackbaud.com/knowledgebase/articles/Article/115497)

|  |  |  |  |
| --- | --- | --- | --- |
| **Codes** | **Do you plan to use** | **List Codes** | **Required Field on application?** |
| Student Codes | [ ]  Yes [ ]  No |  | [ ]  Yes [ ]  No |
| Family Codes | [ ]  Yes [ ]  No |  | [ ]  Yes [ ]  No |
| Internal Codes | [ ]  Yes [ ]  No |  |  |

**Budgets**

Please read the following information on [Budgets.](https://kb.blackbaud.com/knowledgebase/articles/Article/116674) Please make sure your budgets are listed in the correct table.

|  |
| --- |
| **Traditional Budgets**  |
| **Budget Name** | **Budget Total** | **Reserve Amount** | **Reserve till Date** | **Calculation Method** | **Eligibility Criteria** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

|  |
| --- |
| **Tracking Budgets** |
| **Budget Name** | **Calculation Method** | **Eligibility Criteria** |
|  |  |  |
|  |  |  |
|  |  |  |